Adding a Customer through Manage Customer

When the sandbox is updated the customers previously entered are not saved. At go live customers entered into the system will be there for life.

To set the stage for this assignment there are two things you need to have: 1) You must have a customer existing in the system to use that you have created yourself. You will use the Manage Customer feature of the DMVS to create a customer.

2) You must also check your tag inventory levels each time the Sandbox is updated.

TIP – It's always a good idea to 'Search' for your customer first, before adding them to the system.

1   Click the **CUSTOMER** menu, and then select **MANAGE CUSTOMER**.

The Search Window appears.

2   Make up a driver's license number, then perform a DL# search. If a customer is found using that made up DL# please create another DL# until you find one that is brand new to the system and not already associated to a customer. A blank Search results window displays.

3   Write down the DL#. _____

4   Click the **ADD CUSTOMER** button.

The Customer Maintenance window appears.

5   Add the customer to the system.

Refer to steps #10-#12 in Sandbox Assignment 1 if needed.

6   Close the **SEARCH** window.

Verifying Plate Inventory

Check inventory to ensure that Firefighter Lg 1 plates are assigned to your location and window. Please reference Lab 5-14 in the MOVRS online user guide for steps to check inventory.

If there hasn't been any Firefighter plates assigned to your User Profile window, please refer to the sandbox inventory agent for your county. The Inventory Agent would be able to assign the plates to your window to complete this lab.

Adding a Characteristic to a Customer through a T&R transaction and Assigning a Firefighter's Plate

In this transaction the customer brought in the required documentation (Firefighter Certification form) to have their recently purchased vehicle assigned a Firefighter Plate. You will have to assign a characteristic to your customer to assign the Firefighter plate.

Refer to Sandbox Assignment #1 if needed.

TIP:

Step 4: If your Short VIN search does not produce a List window but instead displays no results found, type in another Short VIN until you get a List window displaying many results to choose from.

1. In the **PREQUALIFIER** window, enter the **PURCHASE DATE**.

2. Type the VIN in the **VIN** field.
   You can type a short VIN (/_ _ _ _ _ _) to save time. Sandbox will allow you to make up the last 6 digits of the VIN.

3. Type the driver's license number for your customer in the **OWNER 1** field.

4. Click the **CONTINUE** button.
   The **SEARCH** results list window will likely display. The system will give you a list of vehicles with the same last 6 digits. Select a **Passenger** vehicle from that list by double-clicking the selected line. Write down the VIN you selected. _____
   The **TITLE AND REGISTRATION** window appears.

TIP:

You will be using converted VINS using the select from list process. Some VINS may have a lien attached. Please refer to Sandbox Assignment #2 to release an SI during a transaction if needed.

5. Click the **LEGAL NAME** hyperlink on the **APPLICATION** tab or the **RELATE CUSTOMERS** tab.
   The **CUSTOMER MAINTENANCE** window appears.

6. Click the **CHARACTERISTIC** tab.

7. Click the **ADD ROW** button.

8. Click the **CHARACTERISTIC TYPE** drop-down arrow and select **FIREFIGHTER.**

9. Click the **SAVE** button.
   The customer now qualifies for a Firefighter tag.

10. Click the **REGISTRATION DETAIL** tab on the **TITLE AND REGISTRATION** window.

TIP: After "Go Live" some counties may not store specialized plates at individual windows. Those counties would store them in a "Store Room" or back office. You would have to use the Get Plate button on the Registration Detail tab to assign the specialized plate.

11. Click the **PLATE TYPE** drop-down arrow and select **FIREFIGHTER**.

12. Click the **VALIDATE** button.
    Resolve any errors on the **ERROR WORKSHEET** window.

13. Click the **VALIDATE** button, if necessary.

14. Click the **AUTO APPROVE** button for the NMVTIS discretionary edit message.

15. Click the **CLOSE** button on the **ERROR WORKSHEET** window.

16. Click the **PAY LATER** button.
    The **TRANSACTION READY TO BE PAID** dialog box displays.

17. Click the **NO** button.
    The windows and dialog box close.

Adding a Miscellaneous Transaction

While your customer is registering their vehicle, they request to buy locking license plate bolts. You will use the Miscellaneous Transactions function to charge for this transaction. Take the payment for both transactions and combine them in the cash drawer. This will allow the customer to pay for multiple items with one payment.

18. Click the **CASH DRAWER** menu, then select **MISCELLANEOUS TRANSACTION**.
    The Miscellaneous Transaction (New) window appears.

19. Click the **SEARCH CUSTOMER** button.
    The Search Customer window appears.

20. Type the customer's driver's license number in the **DL#** field.

21. Click the **SEARCH** button.
    The customer's name and Customer # now display in the customer area.

Locking license plate bolts could be a 'Product' drop-down choice in the future. For now we have you using 'Administrative Fee' to complete this lab.

22. Click the **PRODUCT** drop-down arrow and select **ADMINISTRATIVE FEE**.

23. In the **AMOUNT** field enter $3.50. (Do not type the dollar sign).

24. Click the **PAY NOW** button.

    The Payment Manager – Transactions window appears.
    You will see your two transactions grouped together under the customer's name.

25. Click the **SELECT ALL** button.

26. Click the **PAY** button.

27. Collect payment, finalize and generate credentials.